A. Employee Travel Overview / Tips

- Employees are responsible for being familiar with state/agency/office policies & procedures. Check with your Travel Administrator (Trvl. Adm.).
- An employee **must** use direct deposit to use online ISIS Travel.
- The Trvl. Adm. **must** grant travel privileges to you before a Travel Request or Travel Expense information can be entered.
- **Only a Trvl. Adm. should enter an advance.** If an advance was issued, check with your Trvl. Adm. for instructions to enter Travel Expenses.
- Disabling pictures on the Welcome **Single Trip Entry** screen will conserve resources on your computer. Click [Settings...] , remove the checkmark by **Display Graphics** and click ✓ .
- Press ENTER after each field entry.
- Enter COMMENTS for additional information that may be important to your reimbursement.
- Enter COST DISTRIBUTION / ASSIGNMENT as required by your agency.

B. Create Travel Expense Report from Single Trip

Used for non-routine or out of state travel.

1. Select **My Info > Travel Expense > Single Trip Entry** automatically displays.
2. Select **Create a Travel Expense Report**. The screen Welcome to Travel Manager displays with **Choose a Trip Schema**. Select type of trip and click ✓ .
3. When the Travel Expense screen displays, enter the appropriate values in the following fields:

   Start of Trip – Enter the first date of travel.

   Time – Enter the beginning time of travel (system utilizes 24 hour clock).

   End of Trip – Enter the last date of travel.

   Time – Enter the ending time of travel (system utilizes 24 hour clock).

   First Destin. – Enter the first city and state traveling to.

   Trip Country – Defaults US.

   Region – Click on the dropdown to select region of travel (determines allowable costs).

   Reason of Trip – Enter the reason for this trip.
4. Click **Mileage and per diem Reimbursement** tab to display mileage, meals & accommodations sections.
5. Enter amount of mileage. Click ▼ and select different vehicle type if necessary.
6. Click ▼ select the appropriate **Trip Type, Co**.
7. Click ▼ in **Exp Receipt 001** and select appropriate type receipt. Enter the amount of the receipt in the **Amount** field and press **Enter**. Click [✓ Transfer] .
8. Enter all expense receipts for the entire trip.
9. Click [Save] . The Travel Expense displays message "Your trip was saved in status 'Trip Completd' 'To Be Settd'".
10. Click [Results] to view summary of trip.
11. Verify report includes all receipts and reimbursement amount is correct. If correct, print. For printing info see **Section H.**
12. Attach receipts to printed report and follow agency policy concerning trip approvals.

C. Create Travel Expense from Weekly Entry

Used for routine travel.

1. Select **My Info > Travel Expense > Weekly Entry**.
2. Click [Current Week] . The Travel Expense screen will display with current dates. Change dates by typing new date and press Enter or click [Previous Week] or [Next Week] .
3. Enter the appropriate values in the following fields:

   Reason – Enter the reason for this entire trip.

   Destin. – Enter the location of the entire trip.

   Date – Beginning date of the week the trip was taken.

   Reason – Enter the reason for this trip by date if different.

   Day Dest. – Enter the location of the travel on this date.

   Numbe Mls – Enter total number of miles traveled on this date.

   M/kmAllow – Calculated amount reimbursed for mileage on this date.

   Expense Typ. – Enter the amount next to the expense type for this day and press Enter. A receipt window is displayed. Enter additional information if necessary or click ✓ . Enter all expenses for the entire trip.
4. Click [Save] . The Overview of Weekly Reports displays message "Trip XXXX was saved".
5. Select the trip and click [Results] to view summary of trip.
6. Verify report includes all receipts and reimbursement amount is correct. If correct, print. For printing info see **Section H.**
7. Attach receipts to report and follow agency policy concerning trip approvals.

D. Modify a Travel Expense from Single Trip

If payment received for trip, contact Trvl. Adm.

1. Select **My Info > Travel Expense > Single Trip Entry** automatically displays.
2. Welcome to Travel Manager Screen displays all open trips. Select trip to modify and click **Change Travel Expense Report** in the Subsequent Activities column.
3. Travel Expense screen is displayed. Verify Trip Number and dates.
4. Enter/adjust information as necessary.
5. Click [Save] . The Travel Expense displays message "Your trip was saved in the status 'Trip Completd' 'To Be Settd'".
6. Click [Results] to view summary of trip.
7. Verify report includes all receipts and reimbursement amount is correct. If correct, reprint. For printing info see **Section H.**
8. Attach receipts to report and follow agency policy concerning trip approvals.

E. Modify a Travel Expense from Weekly Trip

If payment received for trip, contact Trvl. Adm.

1. Select **My Info > Travel Expense > Weekly Entry**.
2. Overview of Weekly Reports displays all trips. Select trip to modify and click [Change] .
3. Weekly Expense screen is displayed. Verify Trip Number and dates.

   Enter / adjust information as necessary.

4. Click **Save** . The Overview of Weekly Reports displays message “Trip XXXX was saved”.
5. Select the trip and click **Results** to view summary of trip.
6. Verify report includes all receipts and reimbursement amount is correct. If correct, reprint. For printing info see **Section H.**
7. Attach receipts to report and follow agency policy concerning trip approvals.

F. Delete a Travel Expense from Single Trip

1. Select **My Info > Travel Expense > Single Trip Entry** automatically displays.
2. Welcome to Travel Manager screen displays all open trips. Select **List of All Trips**.
3. Click on trip to delete line verifying the date is correct. Click **Delete** . A delete Trip Message is displayed “Are you sure you want XXX to delete the trip?”
4. Click **Yes** . The Travel Manager screen will display the following message “The current version of trip XXX was deleted“.

G. Delete a Travel Expense from Weekly Trip

1. Select **My Info > Travel Expense > Weekly Entry.**
2. Overview of Weekly Reports screen displays all open trips. Click on the trip number to delete and click **Delete** . A delete Trip Message is displayed “Are you sure you want XXX to delete the trip?”
3. Click **Yes** . The Overview of Weekly Reports screen will display the following message “The current version of trip XXX was deleted”.

H. Print Or Save A Travel Report

1. **Click** **Tools ◢** .
2. Select **Print** from the drop down menu. The *Print dialog* box will display.
3. Type **PDF** if **not** displayed in the *Output Device* field.

   Click ✓ . A small SAP Print Data Window will display. Do **not** close until printing is complete. A PDF report will display in another window.
4. **Save** the report click 💾 or **print** the report click 🖨 . Verify correct printer is selected.
5. Click **OK** when **Print** box displays.
6. Click ☒ to close both report windows.

I. Payment Notification

If traveler uses Statewide Email: (your email address format is “firstname.lastname@la.gov”) You will receive an email when payment is processed. The email indicates trip number, travel dates, and amount.

If traveler does **not** use Statewide Email: Verify payment is processed by opening your trip in LEO and clicking on the **Trip Status** button. Approval is at a “Trip Completd” status and Settlement is at a “To Be Settd” status.

View details of the payment by selecting: **My Info > Payment Info > Travel Payments**.

J. A Travel Bank Account

Employees may have travel reimbursements deposited into a bank account other than their **Main Bank**. Create a **Travel Expense Bank** record to add this account in LEO under **My Info > Payment Info > Bank Information**. Refer to the **Bank Information** screen Help scripts before adding a record.

- If you are receiving a payroll check through the mail, you should NOT use this function to make changes to bank information. See your Employee Administrator for assistance.

DO NOT enter an amount in **Standard Value / Standard Percentage.**

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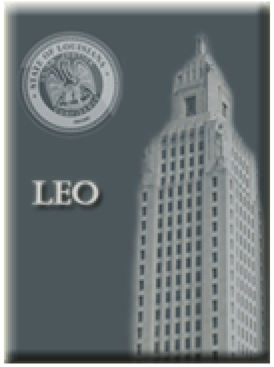

ISIS TRAVEL – EMPLOYEE QUICK REFERENCE CARD

Travel Administrator: ______________________________

Travel Adm. Phone No: ____________________

Logon ID: ______________________
(P & system assigned 8 digit personnel no.)

How to Access Travel:
https://leo.doa.louisiana.gov/irj/portal
Logon to LEO
Select **My Info > Travel Expense**

How to Access Online Help:
Within ISIS Travel, select
Help > ISIS Travel

How to Access Online Learning Courses:
Within LEO, select
My Training tab

What Do You Want To Do? **See**

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For assistance with using LEO travel functions, contact your Travel Administrator.